

APPENDIX B - MERCHANT AND CONSUMER SURVEYS AND SUMMARIES

**H Street Merchants Survey**

Informational	Business Name: <input type="text"/>	Address: <input type="text"/>	
	Owner Name: <input type="text"/>	Address: <input type="text"/>	
	Property Owner: <input type="text"/>	Address: <input type="text"/>	
	1. What is your type of Business:		
	<input type="checkbox"/> Take-out restaurant	<input type="checkbox"/> Hair/nail salon – barber shop	<input type="checkbox"/> Retail-men's clothing
	<input type="checkbox"/> Sit-down eatery	<input type="checkbox"/> Non-profit/social services	<input type="checkbox"/> Retail-women's clothing
	<input type="checkbox"/> Grocery-no liquor	<input type="checkbox"/> Church	<input type="checkbox"/> Retail-sporting goods
	<input type="checkbox"/> Grocery-liquor sale	<input type="checkbox"/> Entertainment	<input type="checkbox"/> Retail-shoes
	<input type="checkbox"/> Liquor store	<input type="checkbox"/> Dry cleaner/Laundromat	<input type="checkbox"/> Retail – other: <input type="text"/>
	<input type="checkbox"/> Arts/cultural related	<input type="checkbox"/> Professional services: (specify) <input type="text"/>	<input type="checkbox"/> Electronics
Longevity/Ownership	2. Size of Business: <input type="text"/> Square feet <input type="text"/> Number of floors occupied <input type="text"/> Number of floors in building <input type="text"/>		
	3a. How long has your business operated? <input type="checkbox"/> Yrs. <input type="checkbox"/> Months	3g. Do you have the option to renew? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	3b. How long have you been at this address? <input type="checkbox"/> Yrs. <input type="checkbox"/> Months	3h. What is your rent? <input type="text"/> \$ Per month or <input type="text"/> \$ Per year	
	3c. How long have you operated in DC? <input type="checkbox"/> Yrs. <input type="checkbox"/> Months	3i. Are your accounting systems automated/electronic? <input type="checkbox"/> Yes <input type="checkbox"/> No 3j. Do you use a computer at your business? <input type="checkbox"/> Yes <input type="checkbox"/> No 3k. Do you accept credit cards? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	3d. How many employees do you have? <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time		
	3e. Do you own or rent your space/building? <input type="checkbox"/> Own <input type="checkbox"/> Rent		
	3f. How long is your term of lease? <input type="checkbox"/> Yrs. <input type="checkbox"/> Remaining		
	4a. What hours do you operate? <input type="text"/> AM to <input type="text"/> PM	4d. Do you have a current business plan? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	4b. When is your peak business period? <input type="text"/> : <input type="text"/> M to <input type="text"/> : <input type="text"/> M	4e. When do you receive deliveries? <input type="checkbox"/> Early AM <input type="checkbox"/> AM <input type="checkbox"/> Noon <input type="checkbox"/> Afternoon <input type="checkbox"/> PM	
	4c. How do you advertise? <input type="checkbox"/> Community newspaper(s) <input type="checkbox"/> City newspaper <input type="checkbox"/> Radio <input type="checkbox"/> Churches		
	Schools <input type="checkbox"/> Website <input type="checkbox"/> Other <input type="text"/>		
Operational	5a. What was your total annual sales in 2001? <input type="text"/>		
	5b. In the last 3 – 5 years, has your business volume... <input type="checkbox"/> Increased <input type="checkbox"/> Remained stable <input type="checkbox"/> Declined		
	5c. In the last year, what percentage at your sales could be considered "new business"? <input type="checkbox"/> 0-20% <input type="checkbox"/> 21-44% <input type="checkbox"/> 50% or more		
	5d. What percentage of your customers come from within the surrounding H Street neighborhood? <input type="checkbox"/> 51% or more <input type="checkbox"/> 50% <input type="checkbox"/> Less than 50%		
	5e. How do your customers come to your business? <input type="checkbox"/> % Walk <input type="checkbox"/> % Drive <input type="checkbox"/> % Bus <input type="checkbox"/> % Bike or taxi		
	5f. What is your average number of customers daily? <input type="text"/>		
Sales/Customer Base	5g. If your patrons drive where do they generally park? <input type="checkbox"/> Street <input type="checkbox"/> Parking lot		

H Street Merchants Survey (continued)

Services and Incentives	6a. Which of these do you know about?					
	<input type="checkbox"/> Enterprise Zone Incentives	<input type="checkbox"/> Master Business Licenses				
	<input type="checkbox"/> HUB Zone Incentives	<input type="checkbox"/> Historic Preservation tax credit benefits				
	<input type="checkbox"/> Advantages of status as a Local Small-Disadvantaged Business Entrepreneur (LSDBE)	<input type="checkbox"/> reSTORE DC – Main Street Initiative				
	<input type="checkbox"/> Setting up a Business Improvement District (BID)	<input type="checkbox"/> Strategic Neighborhood Action Plan (SNAP) recommendations regarding H Street NE and surrounding communities				
	6b. Do you participate in the H Street Merchants & Professionals Association? <input type="checkbox"/> Yes <input type="checkbox"/> No					
	6c. Have you used the services of the H Street Community Development Corporation? <input type="checkbox"/> Yes <input type="checkbox"/> No (If so, which?) <input type="text"/>					
	6d. Do you participate in any other merchants' organization(s)? <input type="checkbox"/> Yes <input type="checkbox"/> No (If so, which?) <input type="text"/>					
	Trends and Attitudes	Family business	7a. Why are you on H Street? <input type="checkbox"/>	7b. What made you locate here? <input type="checkbox"/>	7c. Why do you stay? <input type="checkbox"/>	
		Affordable rent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Community demand for service		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Other		<input type="text"/>	<input type="text"/>	<input type="text"/>		
Rate the H Street corridor in the following factors: (PLACE X IN BOX)						
		Very poor	Poor	Average	Good	Excellent
Physical Image and Character		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleanliness		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Area name recognition		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Credit availability/ease for getting loans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Loyalty/patronage of local shoppers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Government Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
(OPTIONAL)						
Race of business owner. <input type="checkbox"/> Black <input type="checkbox"/> White <input type="checkbox"/> Asian <input type="checkbox"/> Other (specify) <input type="text"/>						



Summary of Trends Regarding H Street Business Owners

From mid April to mid May 2002, the District of Columbia's Office of Planning implemented a survey of business/property owners on H Street NE from 3rd to 17th Street. The purpose of the survey was to gather a sample of information to discern trends affecting H Street owners and their opinions of resources, services and information available to them. This survey was prompted by a pending planning process that would result in a series of recommendations about revitalizing this important neighborhood serving and regional commercial street.

Between 120 and 150 surveys were mailed to H Street business owners. District staff visited each business on the H Street corridor to assist in completing the survey, to provide a copy of the survey to those who did not receive it via mail, to pick up surveys, to encourage completion of the survey and to inform owners about the pending planning process. Twenty-seven surveys (27) were returned. The response level was roughly 20% of owners on the corridor. Geographically, owners were spread across the corridor. Respondents were predominantly local businesses.

The results of the sampling are as follows:

Operations

1. Of those responding, property owner operate approximately half of businesses. Surveys were returned from 14 property owners (52%) and 13 renters (48%).
2. The range of the age of businesses is wide, from a few months up to over 50 years. The average business age is approximately 14 years. On average, just over 11 of those years were spent on H Street.
3. Of those who own their property and business, the average age is almost 16 years, roughly 5 years more than others on H Street. Those renting averaged 6.5 years on H Street.
4. The average employee/staff size is between 3 and 5 full and part-time employees for small business owners. If employment at the corridor's institutions is factored in, the number increases noticeable. Major employers include Capitol Children's Museum, Department of Employment Services, etc. With employment at the Museum alone, the range increases up to over 7 employees on average.
5. Amongst renters, the typical lease term is about 5 years with 85% reporting options to renew.
6. Most businesses maintain 9 AM to 6 PM business hours. However, several reported opening as early as 7 AM and closing as late as 9 or 10 PM. This information will be most useful if mapped for all corridor businesses to determine parking

demand periods.

7. An estimated 67% of businesses do not have a current business plan. 62% of renters do not have a business plan, and 71% of owners do not.
8. 67% of business do not have electronic accounting systems. 62% and 71% of renters and owners, respectively, do not.
9. 52% of all businesses indicated that they have access to a computer at their business. 64% of owners have computer access onsite while only 38% of renters have access.
10. 41% of businesses accept credit card purchases. 54% of renters accept credit cards while 71% of owners do not. This variation may relate to the age of the business as well as the type of business.

Sales and Customer Base

11. Of the nine owners reporting annual sales information, sales average approximately \$475,000. For the four renters reporting, the average is just over \$293,000.
12. 43% of businesses report that over 50% of their customer base comes from the local neighborhood. 22% estimate that half of their customers are local residents while 35% believe that less than half are area residents.
13. Over the last 3 to 5 year period, businesses old enough to report indicate that their customer base has primarily remained stable (44%). 28% report an increase. 11% of businesses report declining customer bases. Review of customer base dynamics by age of business was largely consistent as business between 3 and 5 years, 5 and 10, 10 and 20, 20 and 30, and over 30 years old, predominantly reported a stable customer base.
14. 60% of businesses reported that less than 20% of their customers could be considered "new business."

Trends and Attitudes

15. Between 26 and 37% of businesses indicated that they are on H Street due to community demand for their products and services. 19% report family ties and rent issues, individually, as the reason for their H Street location.
16. Respondents rated the corridors physical image and character as predominantly poor or average (36% in each category).
17. 42% view the corridor's cleanliness as average. 27% found it poor.
18. Safety received a poor rating from 42% of respondents. 38% found it average.

19. 46% found the corridor's name recognition as average. 25% believe it is good.
20. Respondents rated parking from very poor to average. 43% view parking availability as poor. 23% rated parking as very poor and another 23% rated it as average.
21. 44% rated credit availability as poor; 25%, very poor; and 31%, average.
22. Business owners rated customer loyalty as good (45%) or average (41%).
23. 36% find government service delivery to be average; 32%, good; 18%, very poor; and 14%, poor.
24. 65% of all respondents are black; 9%, white; 22%, Asian; and 4%, other.
25. Of owners, blacks constitute 73%; whites, 18%; and Asians, 9%. Of renters, 58% are black; 33%, Asian; and 8%, other.

Services and Incentives

26. There is an astoundingly clear need for District Government to better disseminate information about its programs, initiatives and incentives.
 - 85% do not know about the Enterprise Zone on H Street.
 - 85% do not know about the HUB zone.
 - 81% do not know about the advantages of Local Small Disadvantage Business Entrepreneur status (LSDBE).
 - 93% do not know about how a Business Improvement District (BID) is established.
 - 81% do not know about Master Business Licenses.
 - 93% do not know about the pros and cons of historic preservation and tax credits available for landmark building restoration.
 - 81% do not know about reStore DC Main Streets though H Street was recently designated as such.
 - 93% do not know what the Strategic Neighborhood Action Plan (SNAP) for their Cluster says about H Street.
27. 37% of respondents are active members of the H Street Merchants and Professionals Association.
28. 30% have accessed the services available through the H Street Community Development Corporation (HSCDC).
29. 11% are at least members of another merchants or professional organization.

H Street NE Consumer Survey

Please take a moment to complete the following survey. The information you provide will help guide the revitalization of the H Street NE commercial corridor with valuable information on current conditions and perceptions on and about H Street, NE. All information is voluntary and anonymous.

H Street NE Revitalization DC Office of Planning

For more information on the H Street NE Revitalization Plan please contact

DC Office of Planning
801 N. Capitol Street, NE - 4th Floor
Washington, DC 20002
Phone: 202-442-7600
Fax: 202-442-7637
Karina.ricks@dc.gov
Derrick.woody@dc.gov



For Internal Uses Only:
Date: _____

☐ H ☐ FM
☐ EM ☐ PS
☐ U ☐ CS

<p>1. Where do you live?</p> <p><input type="checkbox"/> Within 3 blocks of H Street NE</p> <p><input type="checkbox"/> Near Northeast, Stanton Park, Linden, Rosedale, or Kingman Park (Cluster 25)</p> <p><input type="checkbox"/> Elsewhere Zip Code <input type="text"/></p>	<p>2. Where do you work/go to school?</p> <p><input type="checkbox"/> Within 3 blocks of H Street NE</p> <p><input type="checkbox"/> In Near Northeast, Stanton Park, Linden, Rosedale, or Kingman Park (Cluster 25)</p> <p><input type="checkbox"/> Elsewhere Zip Code <input type="text"/></p> <p><input type="checkbox"/> Not Applicable</p>
<p>3. What is your annual household income?</p> <p><input type="checkbox"/> Under \$10,000</p> <p><input type="checkbox"/> \$10,000 - \$25,000</p> <p><input type="checkbox"/> \$25,000 - \$50,000</p> <p><input type="checkbox"/> \$50,000 - \$100,000</p> <p><input type="checkbox"/> Over \$100,000</p>	<p>4. How old are you?</p> <p><input type="checkbox"/> Under 18</p> <p><input type="checkbox"/> 18-24</p> <p><input type="checkbox"/> 25-34</p> <p><input type="checkbox"/> 35-49</p> <p><input type="checkbox"/> 50-64</p> <p><input type="checkbox"/> 65 or over</p>
<p>5. What is your gender?</p> <p><input type="checkbox"/> Male</p> <p><input type="checkbox"/> Female</p>	<p>6. How many people are in your household? <input type="text"/></p> <p>What are their ages? (please list)</p> <p><input type="text"/></p>
<p>7. When was the last time you visited H Street NE? (if "never" go to #11)</p> <p><input type="checkbox"/> Today</p> <p><input type="checkbox"/> This week</p> <p><input type="checkbox"/> Last week</p> <p><input type="checkbox"/> Several weeks/months ago</p> <p><input type="checkbox"/> Never: Why not? <input type="text"/></p>	<p>8. How often do you visit H Street?</p> <p><input type="checkbox"/> Daily</p> <p><input type="checkbox"/> Weekly</p> <p><input type="checkbox"/> Once or twice a month</p> <p><input type="checkbox"/> Rarely</p>
<p>9. When do you usually visit?</p> <p><input type="checkbox"/> Workday/school time (9am-5pm)</p> <p><input type="checkbox"/> Mornings</p> <p><input type="checkbox"/> Noontime/lunchtime</p> <p><input type="checkbox"/> Afternoon</p> <p><input type="checkbox"/> Evening</p> <p><input type="checkbox"/> Weekends</p>	<p>10. What was the purpose of your most recent visit?</p> <p><input type="checkbox"/> Work</p> <p><input type="checkbox"/> Shopping or running errands</p> <p><input type="checkbox"/> To eat/get lunch or dinner</p> <p><input type="checkbox"/> Church</p> <p><input type="checkbox"/> Exercising/just passing through</p> <p><input type="checkbox"/> Visiting friends/hanging out</p> <p><input type="checkbox"/> Catching the bus</p> <p><input type="checkbox"/> Browsing/just looking around</p> <p><input type="checkbox"/> Other: <input type="text"/></p>

<p>11. Where do you buy the following goods and services most frequently?</p> <p>"H" - for H Street, NE</p> <p>"U" - for Union Station</p> <p>"M" - for the Hechinger Mall</p> <p>"DC" - for elsewhere in DC</p> <p>"O" - for "outside the District"</p> <p>If you do not purchase, leave the line blank.</p> <p>Retail Items</p> <p><input type="checkbox"/> Everyday clothing</p> <p><input type="checkbox"/> Specialty clothing (hats, hip-hop)</p> <p><input type="checkbox"/> Shoes</p> <p><input type="checkbox"/> Home furnishings (furniture, etc.)</p> <p><input type="checkbox"/> Hardware items</p> <p><input type="checkbox"/> Music (tapes, CDs, etc.)</p> <p><input type="checkbox"/> Books and magazines</p> <p><input type="checkbox"/> Health products (prescription drugs, drug store items, etc.)</p> <p><input type="checkbox"/> Specialty retail (antiques, jewelry, etc.)</p> <p>Food Sales</p> <p><input type="checkbox"/> Groceries</p> <p><input type="checkbox"/> Convenience shop items (soda, etc.)</p> <p><input type="checkbox"/> Carry-out or delivery food</p> <p><input type="checkbox"/> Eat-in or sit down restaurant food</p> <p><input type="checkbox"/> Alcohol purchases (take home)</p> <p><input type="checkbox"/> Specialty foods (nutritional supplements, fresh fish, etc.)</p> <p>Services</p> <p><input type="checkbox"/> Beauty services</p> <p><input type="checkbox"/> Financial services (banking, etc.)</p> <p><input type="checkbox"/> Legal or health services (doctor, lawyer, dentist, etc.)</p> <p><input type="checkbox"/> Automotive services</p> <p><input type="checkbox"/> Contracting services</p> <p><input type="checkbox"/> Entertainment (movies, dancing, etc.)</p>	<p>12. How would you rate H Street on the following characteristics?</p> <p>Mark:</p> <p>"1" - for excellent</p> <p>"2" - for good</p> <p>"3" - for average</p> <p>"4" - for poor</p> <p>"5" - for very poor</p> <p>(fill in each blank)</p> <p><input type="checkbox"/> Variety of goods and services</p> <p><input type="checkbox"/> Cost of goods and services</p> <p><input type="checkbox"/> Quality of goods and services</p> <p><input type="checkbox"/> Sense of comfort/safety</p> <p><input type="checkbox"/> Physical appearance/character</p> <p><input type="checkbox"/> Cleanliness</p> <p><input type="checkbox"/> Friendliness of retailers</p> <p><input type="checkbox"/> Easy and safe for pedestrians</p> <p><input type="checkbox"/> Transit service/access by transit</p> <p><input type="checkbox"/> Parking availability</p> <p><input type="checkbox"/> Neighborhood/community pride</p>
<p>13. What are the top two things that would attract you to H Street more?</p> <p><input type="checkbox"/> Better mix of goods & services</p> <p><input type="checkbox"/> More attractive character</p> <p><input type="checkbox"/> Better sense of personal safety</p> <p><input type="checkbox"/> Easier access (transit/parking)</p> <p><input type="checkbox"/> More things to do</p> <p><input type="checkbox"/> Better sense of what is there</p> <p><input type="checkbox"/> Better prices</p> <p><input type="checkbox"/> Other <input type="text"/></p>	<p>14. What do you like most about H Street today?</p> <p><input type="text"/></p>

Please describe what you would like to see on the H Street corridor or your vision for the street:

H Street NE Consumer Survey

H Street NE Revitalization DC Office of Planning

Thank you for participating.
RETURN SURVEY TO:

DC Office of Planning
801 N. Capitol Street, NE - 4th Floor
Washington, DC 20002

Phone: 202-442-7600
Fax: 202-442-7637
Karina.ricks@dc.gov
Derrick.woody@dc.gov



H Street Consumer Survey Summary Results

Total number of returned surveys
Surveying period - June - August '02

534

	home zip	
Outside DC	104	
Other DC	159	
	20003	12
	20002	14
Not identified	245	

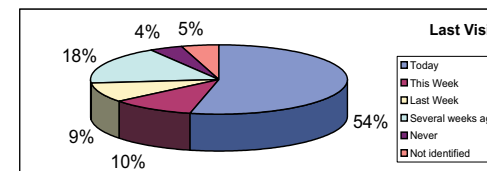
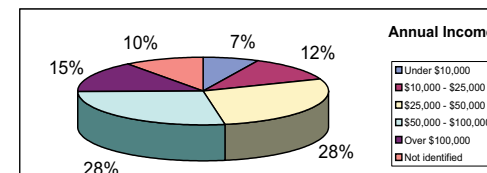
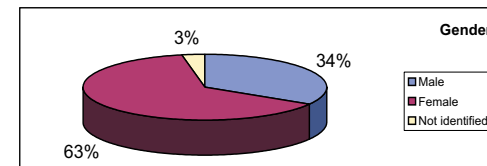
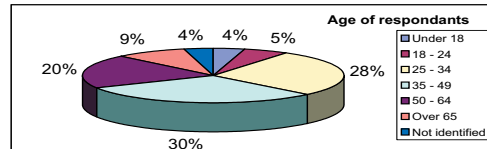
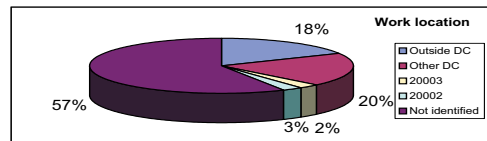
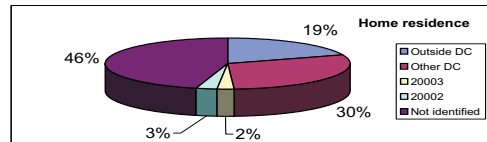
	Work zip	
Outside DC	94	
Other DC	105	
	20003	13
	20002	14
Not identified	308	

	Age	
Under 18	21	
18 - 24	29	
25 - 34	149	
35 - 49	162	
50 - 64	106	
Over 65	47	
Not identified	20	

	Gender	
Male	179	
Female	339	
Not identified	16	

	Annual Income	
Under \$10,000	38	
\$10,000 - \$25,000	64	
\$25,000 - \$50,000	150	
\$50,000 - \$100,000	147	
Over \$100,000	80	
Not identified	55	

	Last Visit	
Today	286	
This Week	56	
Last Week	50	
Several weeks ago	94	
Never	23	
Not identified	25	



* Note 10 "nevers" comment on H Street with familiarity and respond that their frequency of visits to H Street is "rarely" indicating they have probably been to H Street before

Daily	179
Weekly	133
Once or twice a month	102
Rarely	88
Not identified	32

Mornings	63
Work/School time	161
Noontime/lunchtime	34
Afternoon	54
Evening	81
Weekends	93
Not identified	48

Work	131
Shopping/running errands	159
Waiting for the bus	20
Church	57
Visiting/hanging out	13
Browsing/looking around	14
Eating lunch/dinner	19
Exercising/passing through	12
Not identified	37
Other:	72
Hair	38
DMV	6
Other	28

Frequency of Visits

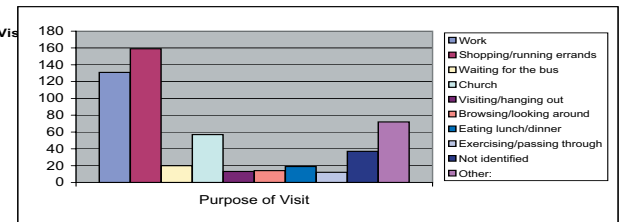
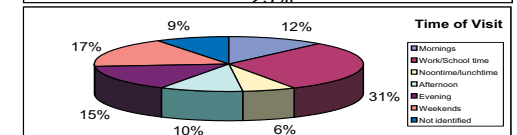
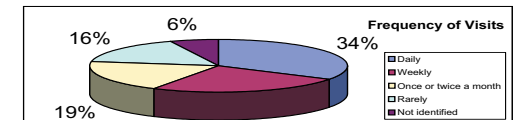
Daily	179
Weekly	133
Once or twice a month	102
Rarely	88
Not identified	32

Time of Visit

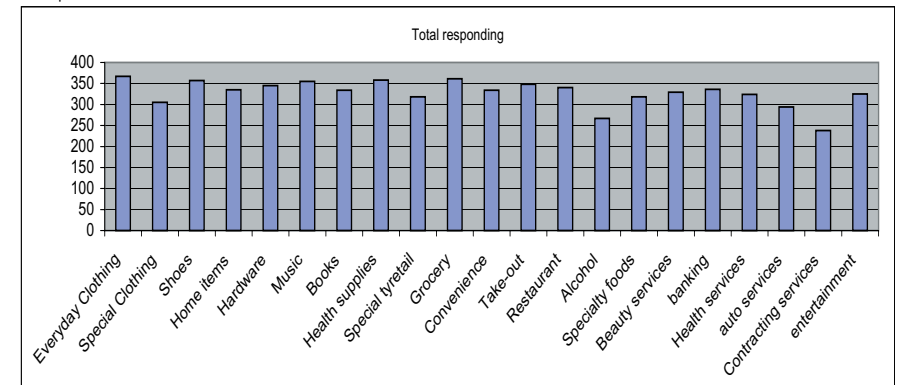
Mornings	63
Work/School time	161
Noontime/lunchtime	34
Afternoon	54
Evening	81
Weekends	93
Not identified	48

Purpose of Visit

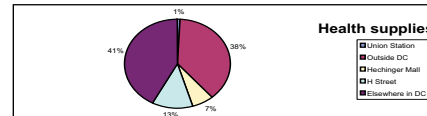
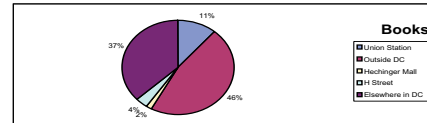
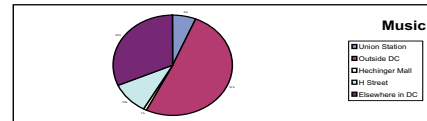
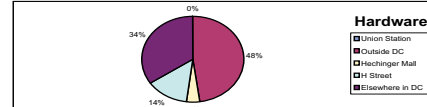
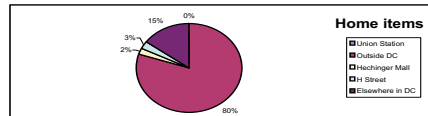
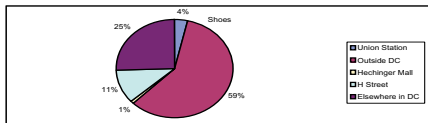
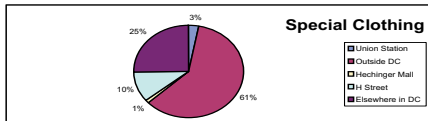
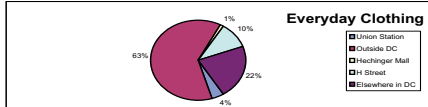
Work	131
Shopping/running errands	159
Waiting for the bus	20
Church	57
Visiting/hanging out	13
Browsing/looking around	14
Eating lunch/dinner	19
Exercising/passing through	12
Not identified	37
Other:	72
Hair	38
DMV	6
Other	28



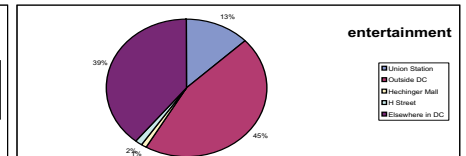
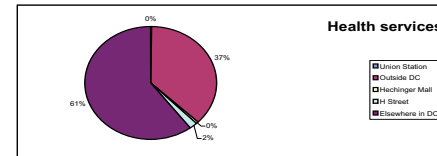
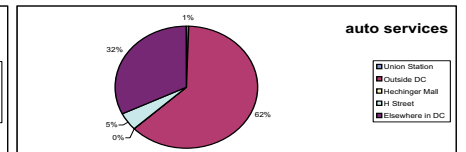
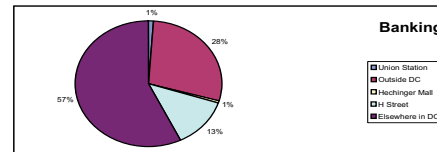
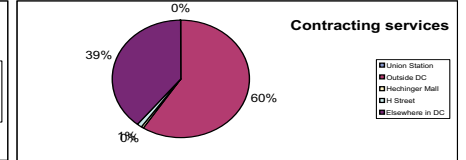
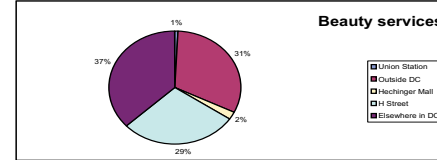
	Everyday	C	Spe	Sho	Home	ite	Harr	Mus	Boo	Hea	Spe	Gro	Con	Tak	Res	Alcc	Spe	Bea	bani	Hea	aut	Con	entertain
Total responding	367	305	357	335	345	355	334	358	318	361	334	348	340	267	318	329	336	324	294	238	325		
Union Station	15	9	13	0	0	23	38	3	3	1	8	20	27	8	4	3	4	1	2	0	42		
Outside DC	230	183	210	268	165	180	155	135	212	148	74	67	145	90	132	103	95	120	183	141	148		
Hechinger Mall	4	4	3	7	14	3	6	24	0	48	12	4	0	0	7	7	2	1	0	1	3		
H Street	38	32	40	10	47	37	12	45	17	20	65	83	10	23	16	94	43	7	14	3	5		
Elsewhere in DC	80	77	91	50	119	112	123	151	86	144	175	174	158	146	159	122	192	195	95	93	127		
No response	168	230	178	200	190	180	201	177	217	174	201	187	195	268	217	206	199	211	241	297	210		



RETAIL ITEMS



SERVICES



Food Purchases

